



Resource: **Strategic Planning**

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MAKE TIME TO PLAN

If your organization has a clear mission, you know your purpose and probably have some ideas about how you will do your work. What you need next is a plan that will help you carry out the projects and programs that fulfill your mission. Many people working in public interest groups don't take time for planning - there's too much "real work" to do. These groups struggle for years, burning-out volunteers and staff, never knowing if they're getting any closer to reaching their goals. Good planning takes time, but it will pay off in many ways.

WHY PLAN?

It makes the overwhelming achievable. When you set out to change the world, you need to set your sights pretty high. In public interest work it's important to be visionary and ambitious; and it's just as important to be realistic and practical. Good planning allows you to do both. It makes it possible to take a big idea, and break it into bite-sized pieces. Good planning has you set inspiring goals, and then identify the manageable steps you can take to move toward your dreams.

It keeps people involved and enthusiastic. Your planning process should be as inclusive as possible. If you involve everyone in the process, they will be ready to share responsibility for the work. A good plan will increase the energy and enthusiasm of your board, volunteers and members. When people can see how they fit into the overall organizational plan, they will know their contribution is valued. Morale stays high when people understand their roles and can anticipate what's coming next. Finally, the benchmarks (or objectives) in a good plan give you the tools to measure your progress along the way. This is critical in maintaining momentum.

It increases resources. A good plan will keep you focused on your priorities, saving time, energy and money. At the same time, a solid plan will make it easier to attract new resources and support. Few things impress potential donors more than a good plan that shows you know where you're headed and how you will get there.

THE SIX STEPS FOR SMART PLANNING

Step 1. Know Where You Want To Go

When people start talking about planning, lots of confusing terms get used: goals, objectives, benchmarks, milestones, etc. Different people use different terms. Here are some definitions that may help: A vision is an ideal or dream. Your vision might be a society where no one is without legal representation. Visions are high and lofty and not likely to be realized in your lifetime. A goal is a translation of your vision into something that you are working toward over the long haul: a day when every law student and lawyer will dedicate time to serving the needs of the poor. Goals are usually achievable, but they should be a stretch. (Most groups try to set goals for a 3-5 year time frame.) Objectives are a lot like goals, but they're smaller. They are the steps that you will take to progress toward your goals. An objective might be to launch a campaign for curricula reform that includes public service graduation requirements.

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Given your group's mission, what is your vision of success? What goals are you working toward? As an organization, you should think about the long term, but setting one or two-year goals will make planning more realistic.

Once you've agreed on a few goals for the year (not many groups can tackle more than 2 or 3 at once), it's time to set some objectives. It might help to think of objectives as milestones or benchmarks. If your one-year goal is curricula reform, an objective might be to enlist the support of one or two influential faculty members. Objectives are only meaningful if they are specific, measurable and practical. Don't set objectives that you can't meet. Objectives help you measure progress along the way. Achieving meaningful objectives gives everyone a chance to see when progress is made. When you complete an objective, take a moment to congratulate yourself and all who helped; a brief pause to acknowledge your success will give you the energy needed to tackle the next objective.

Step 2. Know Where You Are Now

A good plan builds on your strengths and expands your group's ability to do even more. As you set your goals and objectives, it's a good idea to know how far you have to travel, and what kind of help you'll have along the way. What are your strengths and assets? What resources do you have? What special talents or skills can your members or friends contribute? Does your group have a good relationship with the dean, or other influential faculty members? Do you have dozens of enthusiastic members, eager to volunteer for the next campaign? Do you have access to community leaders because of your strong fellowship program? When you map out your plan there will be roadblocks along the way. Know your own strengths, and be prepared to draw on them when you build your strategy.

Step 3. Develop a Strategy That Includes Priorities

There are many routes to any destination. The trick is figuring out which makes the most sense for you. A good place to begin is by brainstorming all of the possible approaches you could take to accomplish your goals. Don't limit yourself to "practical" ideas at this point - be creative. After you've generated lots of ideas about options, you can start to figure out which approach is the best. What strategy will build on your strengths? What makes the best use of your resources? As you map out your strategy, identify specific objectives. What do you want to make sure to accomplish? Once you've identified your objectives, priorities should emerge. Make sure your priorities are clear. When groups assume that they can do "everything" they set themselves up for failure and disappointment. Establish priorities and agree to stick to them.

Step 4. Get Out Your Calendar And Commit To A Plan Of Action

Your action plan answers three questions: 1) What needs to be done? Make a list of all of the tasks that need to be accomplished for each objective. 2) When does it need to be done by? Set deadlines that are realistic and firm. 3) Who will be responsible for doing it? Someone needs to take responsibility for each task. When tasks are delegated to committees, one person on the committee should take lead responsibility for making sure the work gets done. Plans fall apart when there are no mechanisms for holding people accountable.

Step 5. Just Do It! (But Keep Checking In)

As everyone goes along doing their part to carry out the plan, make sure the group checks in on the progress. If one person has taken responsibility for meeting an important deadline, members of the group should ask how it's going before the deadline arrives. A good plan will be flexible enough to allow for adjustments. Group members should help each other by giving feedback and support, and troubleshooting when problems arise.

Step 6. Celebrate And Evaluate

Celebrate your success when you complete a project! Make sure to thank everyone who was involved from start to finish. People deserve to be rewarded for hard work, so don't hold back in acknowledging each person's contribution. At the same time, don't let your celebration keep you from doing a thorough evaluation. Ask the people who were involved three questions: 1) What parts of the project went really well, and why? 2) What didn't go well or where did the plan fall short? 3) What could be done differently the next time? This kind of evaluation can be done during a group meeting or through a follow-up questionnaire. Whichever way you do it - make sure to keep a record of the full evaluation for the group to use in the future.

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